

## **Chapter Overview**

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**Introduction**      The objective of this chapter is to provide a concise, user friendly job aid for accessing, separating, or reenlisting a member. This chapter provides checklists, guides, and information required to complete these tasks.

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## **Section Overview**

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**Introduction**      This section will guide you through the process of accessing a member onto active duty.

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## Process for Accessions

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**Introductions**      The accession process depends on communication between the member, unit, and PERSRU to ensure a smooth transition into the Coast Guard. This process is broken down into stages based on what needs to be completed and who is responsible.

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**Process**              This is the process.

Stage	Who does it	What Happens
1	Member	Completes DD Form 2058 CG, IRS W4 Form, and appropriate state tax withholding certificate
2	Unit	Completes PCS Reporting Checklist, forwards with DD-2058 CG to PERSRU
3	PERSRU	<ul style="list-style-type: none"><li>• Creates PDR</li><li>• Submits PMIS/JUMPS transactions</li><li>• Contacts unit for additional information if needed.</li><li>• If applicable starts MGIB allotment</li></ul> <p><b>Note: For members who are changing components of the Coast Guard with no break in service, the PERSRU must ensure that a discharge transaction (P203) has been completed on the member prior to transmitting accession transactions in PMIS/JUMPS.</b></p>

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## Types of Accessions

### Introduction

Accession is the process of establishing personnel and pay records when a member comes on active duty. There are several ways to be accessed and several points where members can be processed.

### Types of accessions

This table describes types of accessions and identifies processing points.

Types	Description	Processing Points
Direct commission	When an officer comes from the civilian sector and is processed through officer basic training before departing for their first unit.	Academy
Cadet Graduates	When a Cadet graduates from the Academy and becomes an officer.	Academy
Cadet	When a Cadet reports to the Academy.	Academy
Former Cadet with a reserve obligation	Non-Prior service cadets whose appointment is terminated in their junior or senior year are assigned to the Coast Guard Reserve SELRES Transition Pool for 59 days and subsequently assigned to either the IRR or a drilling unit to complete their military obligation.	Academy
Prior service	When an enlisted member comes from another service and attends Basic Training (except REBI students).	Cape May
	When a member comes from prior CG or CG Reserve and reports directly to a unit without going through basic training. <b>Note:</b> This includes members who are being discharged from the active duty component of the Coast Guard to be immediately accessed into the reserve component of the Coast Guard and vice versa. <b>The servicing PERSRU losing the member must submit the discharge transaction (P203).</b>	The PERSRU for the member's first permanent duty station (or first temporary duty station if member remains there for an extended amount of time)
	When a member reports directly to the Individual Ready Reserve (IRR).	Servicing ISC PERSRU
	If the member enlists in the reserves and attends Cape May as a REBI student.	The PERSRU that services the member's first permanent duty station
Recruits	When an enlisted member goes to basic training before departing for their first unit.	Cape May

## Recalled Retired Members

**Introduction** The Commandant may direct that a retired member be recalled to active duty. These members may be paid by HRSIC (RAS) or by HRSIC (MAS) through PMIS/JUMPS depending on the duration of the recall.

**Payment Method** Use this table to determine if the member will be paid by HRSIC (MAS) or by HRSIC (RAS).

If the member is	and the duration of the recall is	then the member is paid by
Immediately recalled to active duty upon retirement (no break in service)	for any period immediately following retirement	<ul style="list-style-type: none"><li>PMIS/JUMPS.</li><li>The PERSRU will prepare and submit a personnel action form P193 with the effective date as the day prior to retirement (last day of active duty).</li></ul>
Recalled to active duty after a break in service of more than 24 hours	for 30 days or more	<ul style="list-style-type: none"><li>PMIS/JUMPS.</li><li>The PERSRU will prepare and submit the documents necessary to access the member.</li></ul>
Recall to active duty after a break in service of more than 24 hours	for less than 30 days	<ul style="list-style-type: none"><li>HRSIC (RAS) manually.</li><li>RAS will continue to deliver the member's retired pay, but will charge to active duty appropriation, and make an off-line payment for the balance of the active duty pay entitlements due for the period of active duty.</li></ul>
Recalled from RET-2 status	for more than 139 days	<ul style="list-style-type: none"><li>PMIS/JUMPS. Member is on extended active duty.</li></ul>
Recalled from RET-2 status	for less than 139 days	<ul style="list-style-type: none"><li>HRSIC (CST) manually.</li></ul> <p><b>Note:</b> Refer to the next page for procedures on how to process these members.</p>

## Recalled RET-2 Members

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**Definition** A member in a Retire 2 status is a member in the reserves retired with a 15-20 year letter.

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**Recalling RET-2 members for less than 139 days** The Commandant may recall a member in a RET-2 status to active duty. These members will be manually paid by PMIS/JUMPS, when the active duty period is less than 139 days. HRSIC (CST) will make payment when all documentation has been submitted.

The table below illustrates this process:

Stage	Who does it	What happens
1	CGPC	<ul style="list-style-type: none"><li>• Issues orders.</li><li>• Sends original to member.</li><li>• Sends copy to active duty unit (if active duty at other than CGPC).</li><li>• Faxes copy of orders to HRSIC (CST).</li></ul>
2	Member	<ul style="list-style-type: none"><li>• Checks in at unit where active duty will be performed.</li></ul>
3	Unit	<ul style="list-style-type: none"><li>• Faxes copy of endorsed orders to HRSIC (CST).</li></ul>
4	HRSIC (CST)	<ul style="list-style-type: none"><li>• Submits PCS Departing and PCS Reporting transactions to place member at active duty unit.</li><li>• Submits R910 to establish TRA/PAY CAT.</li><li>• Submits R990 to pay member for active duty period.</li></ul> <p><b>Note:</b> HRSIC (CST) will also submit PCS Departing and PCS Reporting transactions to return member to RET-2 status one update after the transactions above have been processed.</p>
5	Member	<ul style="list-style-type: none"><li>• Completes travel claim (within three days of completion).</li><li>• Sends travel claim to HRSIC (TVL).</li></ul>
6	HRSIC (TVL)	<ul style="list-style-type: none"><li>• Processes travel claim.</li><li>• Issues payment for travel.</li></ul>
7	HRSIC (CST)	<ul style="list-style-type: none"><li>• Processes active duty pay manually.</li><li>• Issues payment.</li></ul>

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## Section Overview

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**Introduction**      This section prescribes procedures for separating members on active duty whose obligated service is for 140 days or more.

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## **The Separation Process**

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**Introduction**      The proper execution of the separation process depends on close communication between all participants. Timely processing of all paperwork is essential to provide the member a smooth transition and to ensure separation payments are made consistent with applicable directives.

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- References**
- Certificate of Release or Discharge from Active Duty DD Form 214, Instructions for the Preparation and Distribution of, COMDTINST M1900.4 (series)
  - Separations Program Designators Handbook
  - CG Personnel Manual
  - Section 12-A, Separation of Commissioned and Warrant Officer on Active Duty
  - Section 12-B, Separation of Enlisted Personnel on Active Duty
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**Retention on Active Duty**      When a member is retained for any reason beyond the established separation date, documentation submitted to PMIS/JUMPS to process the original separation must be deleted and modified/replaced with new transactions. This may require action by various sources:

<b>WHO</b>	<b>MAY NEED TO</b>
CGPC (opm)	extend an officer's date of separation
Member's PERSRU	submit a Personnel Action to indicate a member has been retained beyond normal expiration of enlistment.
HRSIC	reopen the member's pay account and reprocess the separation

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## The Separation Process, Continued

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**Types of  
separations**

Separations are classified as immediate, priority, or routine. Each type is defined below:

Type	Description
<b>Immediate</b>	Separations which must be processed in less than 15 days. Separation requires 4 working days for processing by HRSIC. This 4-day clock begins once the PERSRU notifies HRSIC of the authorization to separate the member. Final payment will be made by direct deposit.
<b>Priority</b>	Separations which must be processed within a 15 to 30 day period.
<b>Routine</b>	Separations which can be processed in 30 days or more.  <b>Note:</b> 30 days is the minimum time in which a Routine separation can be processed. In order to avoid delay in the final payment or payment for any leave sold, units/members must submit the Career Intentions Worksheet (CG HRSIC-2045) to the PERSRU not later than 60 days prior to the separation date.

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## The Separation Process, Continued

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**Which type to use**

This table prescribes separation classifications.

<b>IF separation is</b>	<b>THEN use</b>
due to misconduct and unit commanding officer desires rapid administrative action	Immediate
not due to misconduct, but rapid administrative action is required <b>Requests may be made by command's (CO/XO) by contacting HRSIC (SES) at (785) 357-3550</b>	Immediate
for reserve members disenrolling from a class "A" school, officer candidate school, or other training program	Immediate
due to unsatisfactory performance	Priority
due to unsuitability	Priority
due to physical disability	Priority
directed by CGPC (epm-1) for urgent reasons	Priority
under normal circumstances	Routine

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## Immediate Separation Processing

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**Introduction**      Immediate separations require 4 working days for processing after receipt of CGPC (epm-1) authorization to separate the member.

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**Procedures**      Procedures required for an Immediate separation.

Day	Who does it	What happens
1  T H R U	UNIT	<ul style="list-style-type: none"><li>Ensures member is physically qualified for separation.</li><li>Notifies PERSRU upon receipt of separation authority from CGPC.</li></ul> <p><b>Note:</b> For Immediate separations requiring less than normal processing time, a signed CG-3307 (use (SEP-1) in the current Preparation and Submission of Administrative Remarks, COMDTINST 1000.14A) by the member must be faxed (785-295-2544) to HRSIC (SES).</p>
	PERSRU	<ul style="list-style-type: none"><li>Sends Urgent E-mail to HRSIC-SES (or <a href="mailto:SES/HRSIC@maillant.uscg.mil">SES/HRSIC@maillant.uscg.mil</a> if sending from SWSII) with pertinent information using the format provided in Exhibit 3-B-1. <b><u>The request for Document Number and Accounting Data can also be sent on this e-mail by using the format provided in Exhibit 3-B-2.</u></b></li></ul> <p><b>Note:</b> The E-mail must be routed through and released by the PERSRU supervisor (with “By direction” authority).</p> <ul style="list-style-type: none"><li>Prepares and transmits a Change Tax (Address) Information transaction.</li><li>Prepares the DD-214</li><li>Prepares the appropriate SDAII transactions.</li><li>Prepares appropriate separation letter(s) from enclosure (4) of this manual.</li></ul> <p><b>Note:</b> The Change Tax (Address) Information transaction must be completed to facilitate mailing of the final pay and the end of year mailing of the member’s IRS Form W-2.</p>

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## **Immediate Separation Processing, Continued**

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**Procedures**  
**(continued)**

<b>Day</b>	<b>Who does it</b>	<b>What happens</b>
1	HRSIC (SES)	Upon receipt of the PERSRU's E-mail. <ul style="list-style-type: none"><li>• Provides Document Number and Accounting Data to PERSRU via return urgent E-mail.</li><li>• Calculates the final pay due the member.</li><li>• Sends E-mail to the PERSRU with the required data to complete block 18 (remarks) of the DD-214, (if applicable) relative to payment of disability severance pay, the SRB recoupment endorsement on the reverse side of the DD-214 (if applicable) and the amount of payment authorized.</li></ul>
3	PERSRU	Receives Document Number and Accounting Data from HRSIC (SES) and issues Separation Order to the member using a Standard Travel Order Form and instructions contained in Exhibit 3-B-4.
4	UNIT	Delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Orders, appropriate travel claim forms, an envelope addressed to HRSIC (TVL) for liquidation purposes, and the standard separation letter.
	PERSRU	On the effective date of separation, transmits the separation transaction.

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## Priority Separation Processing

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**Introduction**      Priority separations require 15 working days for processing. Therefore, to allow for weekends and holidays, the effective date of separation should be 21 calendar days after receipt by HRSIC of the PERSRU E-mail requesting expedited separation processing.

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**Procedures**      Procedures required for a Priority separation.

Day	Who does it	What happens
1  T H R U	UNIT	<ul style="list-style-type: none"><li>• Ensures member is physically qualified for separation</li><li>• Notifies PERSRU</li></ul> <p><b>Note:</b> For Priority separations requiring less than normal processing time, a signed CG-3307 (use (SEP-1) in the current Preparation and Submission of Administrative Remarks, COMDTINST 1000.14A) by the member must be faxed (785-295-2544) to HRSIC (SES).</p>
9	PERSRU	<ul style="list-style-type: none"><li>• Sends Urgent E-mail to HRSIC-SES (or <a href="mailto:SES/HRSIC@maillant.uscg.mil">SES/HRSIC@maillant.uscg.mil</a> if sending from SWSII) with pertinent information using the format provided in Exhibit 3-B-1. <b><u>The request for Document Number and Accounting Data can also be sent on this e-mail by using the format provided in Exhibit 3-B-2.</u></b></li></ul> <p><b>Note:</b> The E-mail must be routed through and released by the PERSRU supervisor (with “By direction authority”).</p> <ul style="list-style-type: none"><li>• Prepares and transmits a Change Tax (Address) Information transaction.</li><li>• Prepares the DD-214.</li><li>• Prepares the appropriate SDAII transactions.</li><li>• Prepares appropriate separation letter(s) from enclosure (4) of this manual.</li></ul> <p><b>Note:</b> The Change Tax (Address) Information transaction must be completed to facilitate mailing of the final pay and the end of year mailing of the member’s IRS Form W-2.</p>

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## Priority Separation Processing, Continued

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**Procedures**  
**(continued)**

Day	Who does it	What happens
1  T H R U  9  (Cont.)	HRSIC (SES)	Upon receipt of the PERSRU's E-mail. <ul style="list-style-type: none"><li>• Provides Document Number and Accounting Data to PERSRU via return E-mail or Telephone.</li><li>• Calculates the final pay due the member.</li><li>• Sends E-mail to the PERSRU with the required data to complete block 18 (remarks) of the DD-214, (if applicable) relative to payment of disability severance pay, the SRB recoupment endorsement on the reverse side of the DD-214 (if applicable) and the amount of payment authorized.</li><li>• Schedules a special payment through Treasury to ensure member receives final separation pay on his/her separation date.</li></ul>
	PERSRU	Receives Document Number and Accounting Data from HRSIC (SES) and issues Separation Order to the member using a Standard Travel Order Form and instructions contained in Exhibit 3-B-4.  <b>Note:</b> If the HRSIC (SES) separation E-mail is not received at least 7 days prior to the date of separation, contact HRSIC (SES). Nonreceipt of the E-mail is an indication of a problem with the separation processing.
LAST DAY	UNIT	On the effective date of separation, delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Order, appropriate travel claim forms, an envelope addressed to HRSIC (TVL) for liquidation purposes, and the standard separation letter(s).
	PERSRU	On the effective date of separation, transmits the separation transaction.

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## **E-mail Format for Immediate and Priority Separations**

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### **(Not Requesting a Document Number and Accounting Data)**

**SUBJ: SEPARATION FOR** \_\_\_\_\_ **(NAME/SSN)** \_\_\_\_\_, USCG(R)

A. CITE CGPC MESSAGE AUTHORIZATION (DTG)

1. CITE TYPE OF SEPARATION: IMMEDIATE, PRIORITY, OR DISABILITY

**NOTE:** The CO/XO must call SES for all Immediate separations unless the member's SPD code ends with one of the following two characters:

FS FU JA JB JC JD JE KA KB KD KF KK KL KM KN KQ NC

2. DATE OF SEPARATION

3. SPD CODE

4. LEAVE INFORMATION (PERSRU must still input leave transactions)

A. NUMBER OF DAYS LEAVE SELLING

B. NUMBER OF DAYS TERMINAL LEAVE TAKING AND THE DATES OF TERMINAL LEAVE

C. NUMBER OF DAYS LEAVE TAKEN AND THE DATES OF LEAVE, NOT POSTED IN RECENTS

D. NUMBER OF DAYS EXCESS LEAVE (Only if allowed by CO)

**NOTE:** Include any leave scheduled to be taken prior to separation. The PERSRU must still input the leave transaction(s). Enter 'NONE' in each block when not applicable.

5. LOST TIME NOT POSTED IN RECENTS

**NOTE:** Enter 'NONE' when not applicable.

6. PAY ADJUSTMENTS NOT POSTED IN RECENTS:

A. REDUCTION: RATE AND DATE

B. FORFEITURE: AMOUNT AND DATE

C. MUTUAL ASSISTANCE (follow procedures noted on page 9-A-5 of this manual)

D. OTHER INDEBTEDNESS (see page 9-A-4 of this manual prior to transmission of this e-mail)

E. ENTITLEMENTS NOT POSTED IN RECENTS (PERSRU must still transmit necessary transactions)

F. BONUS PAYMENTS PREVIOUSLY MADE (SRB, SELRES, or Enlistment Bonus)

**NOTE:** Enter 'NONE' when not applicable.

7. FINAL MAILING ADDRESS AFTER SEPARATION AS INDICATED ON THE CHANGE TAX (ADDRESS) INFORMATION TRANSACTION SUBMITTED THIS DATE IS

8. PERSRU POINT OF CONTACT (name and phone number)

**NOTE:** When producing this e-mail, ensure each paragraph is typed out entirely (i.e., paragraph 2 would read "Date of Separation: 99Jan01" vice "99Jan01").

### **EXHIBIT 3-B-1**

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## **E-mail Format for Immediate and Priority Separations and Request for Document Number and Accounting Data**

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**SUBJ: SEPARATION FOR \_\_\_\_\_ (NAME/SSN) \_\_\_\_\_, USCG(R) AND REQUEST FOR DOCUMENT NUMBER AND ACCOUNTING DATA**

A. CITE CGPC MESSAGE AUTHORIZATION (DTG)

1. CITE TYPE OF SEPARATION: IMMEDIATE, PRIORITY, OR DISABILITY

**NOTE:** The CO/XO must call SES for all Immediate separations unless the member's SPD code ends with one of the following two characters:

FS FU JA JB JC JD JE KA KB KD KF KK KL KM KN KQ NC

2. DATE OF DEPARTURE FROM UNIT

3. DATE OF SEPARATION

4. MEMBER'S PERMANENT DUTY STATION OPFAC

5. SPD CODE

6. LEAVE INFORMATION (PERSRU must still input leave transactions)

A. NUMBER OF DAYS LEAVE SELLING

B. NUMBER OF DAYS TERMINAL LEAVE TAKING AND THE DATES OF TERMINAL LEAVE

C. NUMBER OF DAYS LEAVE TAKEN AND THE DATES OF LEAVE, NOT POSTED IN RECENTS

D. NUMBER OF DAYS EXCESS LEAVE (Only if allowed by CO)

**NOTE:** Include any leave scheduled to be taken prior to separation. The PERSRU must still input the leave transaction(s). Enter 'NONE' in each block when not applicable.

7. LOST TIME NOT POSTED IN RECENTS

**NOTE:** Enter 'NONE' when not applicable.

8. PAY ADJUSTMENTS NOT POSTED IN RECENTS:

A. REDUCTION: RATE AND DATE

B. FORFEITURE: AMOUNT AND DATE

C. MUTUAL ASSISTANCE (follow procedures noted on page 9-A-5 of this manual)

D. OTHER INDEBTEDNESS (see page 9-A-4 of this manual prior to transmission of this e-mail)

E. ENTITLEMENTS NOT POSTED IN RECENTS (PERSRU must still transmit necessary transactions)

F. BONUS PAYMENTS PREVIOUSLY MADE (SRB, SELRES, or Enlistment Bonus)

**NOTE:** Enter 'NONE' when not applicable.

9. FINAL MAILING ADDRESS AFTER SEPARATION AS INDICATED ON THE CHANGE TAX (ADDRESS) INFORMATION TRANSACTION SUBMITTED THIS DATE IS

10. PERSRU POINT OF CONTACT (name and phone number) AND PERSRU SWSII OR SWSIII E-MAIL ADDRESS

**NOTE:** When producing this e-mail, ensure each paragraph is typed out entirely (i.e., paragraph 2 would read "Date of Separation: 99Jan01" vice "99Jan01").

### **EXHIBIT 3-B-2**



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## Routine Separation Processing

**Introduction**      Routine separations occur with sufficient lead-time to allow routine processing.

**Procedures**      Procedures required for Routine separation.

<b>When</b>	<b>Who does it</b>	<b>What happens</b>
At least 180 days prior to Separation	UNIT	Ensures member is physically qualified for separation.
At least 60 days prior to Separation	PERSRU	Prepares and transmits Statement of Intent and Change Tax (Address) Information transactions to PMIS/JUMPS.  <b>Note:</b> Failure to submit these documents in a timely manner will normally result in delay in final pay or payment for any leave sold. The PERSRU must notify HRSIC (SES) if there is any change to the information submitted on the Statement of Intent or Change Tax (Address) transactions. On routine separations, the amount of final pay will appear on the member's prior month LES.
At least 45 days prior to the member's scheduled departure date	PERSRU	Requests Document Number and Accounting Data from HRSIC (SES) via E-mail (SWSIII - HRSIC-SES; SWSII – <a href="mailto:SES/HRSIC@maillant.uscg.mil">SES/HRSIC@maillant.uscg.mil</a> ) per Exhibit 3-B-2. Please ensure the subject line of E-mail reads: "REQUEST FOR DOCUMENT NUMBER/ACCTING DATA."  <b>Note:</b> The E-mail must be routed through and released by the PERSRU supervisor (with "By direction authority").
At least 30 days prior	HRSIC (SES)	Receives the PERSRU's E-mail and provides Document Number and Accounting Data to PERSRU via return E-mail.
Prior to separation	PERSRU	Verifies the member's leave balance in order to complete block 16 (days accrued leave paid) of the DD-214.

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## **Routine Separation Processing, Continued**

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**Procedures**  
**(continued)**

<b>When</b>	<b>Who does it</b>	<b>What happens</b>
At least 10 days prior to separation	HRSIC (SES)	Notifies the PERSRU of the required data to complete block 18 (remarks) of the DD-214 (if applicable) relative to the payment of Severance Pay, Disability Severance Pay, Lump Sum Readjustment Payment or Separation Pay, and SRB recoupment endorsement on the reverse side of the DD-214 (if applicable).
7 days prior to separation	PERSRU	If information required for block 18 of the DD-214 (if applicable) has not been received, contacts HRSIC (SES).
Prior to separation	HRSIC (SES)	Inputs the necessary transactions to PMIS/JUMPS for final pay due the member.
Day of separation	UNIT	Delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Order, appropriate travel claim forms, an envelope addressed to HRSIC (TVL) for liquidation purposes, and the standard separation letter.
Day of separation	PERSRU	Transmits separation transaction (discharge or Endorsement on Orders (RELAD)).

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## Requesting a Document Number and Accounting Data for Routine Separations

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The responsible PERSRU shall request a Document Number and Accounting Data via E-mail to HRSIC-SES (or [SES/HRSIC@maillant.uscg.mil](mailto:SES/HRSIC@maillant.uscg.mil) if using SWSII). Send only 1 request per E-mail. Requests must contain the following information in the body of the E-mail (do not send as an E-mail attachment):

- Member's name, rank/rate and SSN
- Member's permanent duty station OPFAC
- Date of departure from the unit
- Date of Separation
- Type of Separation
- Separation Classification (Routine/Priority/Immediate)
- City, State and Zip Code of the member's separation address or other location to which the member is entitled to travel and transportation of HHG
- PERSRU point of contact and telephone number
- PERSRU SWSII or SWSIII delivery E-mail address

**Note 1:** The E-mail must be routed through and released by the PERSRU supervisor with "By direction" authority.

**Note 2:** Please follow the format provided in Exhibit 3-B-2, if request is for an Immediate or Priority Separation.

**Note 3:** If TONO request has not been answered within 5 working days, please call the SES Business Line at (785) 357-3550 for assistance.

## Cancellation of Document Numbers and Accounting Data

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Separation Document Number and Accounting Data issued to a member who wishes to remain in the service must be cancelled. In this event, the responsible PERSRU must send a **Coast Guard message** (not an E-mail) within 48 hours of discovering the need for cancellation to COMDT (CG-WRP-2) with HRSIC (SES), HRSIC (TVL), and the responsible Transportation Officer as information addressees, requesting cancellation of the Document ID. The **message** should contain the following information:

- Member's rate/rank, name, SSN and unit.
- Document Number and Accounting Data issued; date issued
- Member's scheduled separation date.
- Reason for cancellation request and member's resulting status (e.g. Reenlisted, Extended, Retained). If member is retained provide reason, estimated duration and subsequent status at the end of retention.
- PERSRU SWS II or SWSIII delivery E-mail address.

**NOTE:** Members electing to remain in the service where actions to expend funds have been made (e. g. Shipment of household goods has occurred) shall be counseled on their liability and the applicable recoupment procedures. Such counseling shall be documented and acknowledged by the member's signature on their separation orders.

### EXHIBIT 3-B-3

## Preparation of Separation Orders

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**Introduction** After receipt of the Document Number and Accounting Data from HRSIC, the responsible PERSRU shall issue Separation Orders on a Standard Travel Order for Military Personnel (CG-5131).

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**Special Instructions** Separation Orders shall include the following information:

Block	Entry
Station/ Place	Indicate the member's separation address or other location to which he/she is entitled to travel and transportation of HHG.
Nature of Duty	Enter "Discharge" or "RELAD" (as appropriate).
Item 10	Enter the following statement <b>"You are directed to submit a Travel Claim to HRSIC (TVL) within 3 days after completion of the travel under these orders. If you decide to cancel these orders, you are personally liable for the repayment of any funds expended in accordance with these orders."</b>

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**Statement required should separation be cancelled** If a member elects to remain on active duty after funds have been expended during separation processing, the following amendment to members separation orders shall be made:

"I acknowledge that I have voluntarily elected to remain on Active Duty after previously starting separation processing, and that I have been counseled concerning my liability to repay any funds expended during my separation processing and the applicable recoupment procedures."

MEMBER'S SIGNATURE

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### Exhibit 3-B-4

## **Enlisted to Cadet Status Processing**

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**Introduction**      The Academy PERSRU has the primary responsibility for ensuring a member's pay account in PMIS/JUMPS is converted to cadet status when an enlisted member is being released from active duty to accept an appointment as a Cadet at the Coast Guard Academy.

The member's PERSRU has the responsibility to ensure that the member's PCS transfer is handled in a timely and accurate manner.

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**Procedures**      When transferring an enlisted member to the Academy for appointment as a Cadet, the member's PERSRU shall:

- Prepare and transmit the Statement of Intent transaction and the Change Tax (Address) Information transaction to PMIS/JUMPS at least 45 days prior to the Cadet swearing-in date.
- Upon the member's departure, submit an Endorsement on Orders transaction departing the member PERMDU for instruction to the Coast Guard Academy (use OPFAC 60-66017).

Note: Advance Pay cannot be authorized (the member will be separated upon swearing-in as a cadet and would not be able to liquidate an advance).

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**Section B**  
**SEPARATIONS**

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## Regular Retirement Separations

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**Introduction**      Retirements are usually processed as routine separations

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**Procedures**      Procedures required for a retirement.

<b>When</b>	<b>Who does it</b>	<b>What happens</b>
At least 60 days prior to: <ul style="list-style-type: none"><li>• the date the member goes on terminal leave: or,</li><li>• the effective date of retirement, whichever is earlier</li></ul>	PERSRU	Prepares and transmits Statement of Intent (SOI) and Change Tax (Address) Information transactions to PMIS/JUMPS
<b>Note:</b> If an SOI has processed in the system by the end-month compute for the month prior to the month of separation, the regular mid-month payment and the final pay, as well as allotments will be paid by PMIS/JUMPS and the final pay projection will include any leave being sold.		
Prior to separation	PERSRU	Verifies the member's leave balance in order to complete block 16 (days accrued leave paid) of the DD-214.
<b>Note:</b> The PERSRU will notify HRSIC (SES) if there is any change to the information submitted on the Statement of Intent or Change Tax (Address) transactions. On routine separations, the amount of final pay will appear on the member's prior month LES.		
Day of separation	Unit	Delivers the DD-214, the final payment, (unless the member is on direct deposit) and the standard separation letter.
	PERSRU	Transmits Endorsement on Orders transaction.

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## Disability Retirement Separations

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**Introduction** Temporary and permanent disability retirements are retirements that are approved under the physical disability evaluation system. They are processed as priority separations. The retirement date for members in this category will normally be 20 working days after the date CG Personnel Command's action. Active duty allotments will be paid by PMIS/JUMPS for the last month of active duty.

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**Procedures** Procedures required for Temporary and Permanent Disability Retirements.

Day	Who does it	What happens
0	CGPC (opm/epm)	Issues message directing temporary or permanent disability retirement.
1	PERSRU	<ul style="list-style-type: none"><li>• Sends urgent E-mail message to HRSIC (SES) with pertinent information using the format provided in Exhibit 3-B-1.</li><li>• Prepares and transmits a Change Tax (Address) Information Transaction in SDA II</li></ul> <p><b>Note:</b> The Change Tax (Address) Information transaction must be completed to facilitate mailing of the final pay and the end of year mailing of the member's IRS Form W-2.</p> <ul style="list-style-type: none"><li>• Prepares the Endorsement on Orders transaction in SDA II</li></ul>
2	HRSIC (SES)	<p>Notifies the PERSRU of the required data to complete block 18 (remarks) of the DD-214 (if applicable) relative to the payment of Severance Pay, Disability Severance Pay, Lump Sum Readjustment Payment or Separation Pay, and SRB recoupment endorsement on the reverse side of the DD-214 (if applicable).</p> <ul style="list-style-type: none"><li>• Calculates the final pay due the member.</li><li>• Schedules a special payment through Treasury to ensure the member receives final separation pay on his/her separation date.</li></ul>
13	PERSRU	If the HRSIC (SES) separation notification is not received at least 7 days prior to the date of separation, contacts HRSICS (SES). Nonreceipt of this E-mail message is an indication of a problem with the separation processing.
	Unit	On the effective date of retirement, delivers final pay, the DD-214, the standard separation letter to the member.
	PERSRU	On the effective date of terminal leave or retirement, transmits the Retirement (Endorsement on Orders) transaction.

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**Section B**  
**SEPARATIONS**

## Checklist for Separations

**Introduction** This checklist is provided to assist the unit/PERSRU in completing all necessary tasks required for separating members from active duty. It should be used along with the Checklist for RELAD (pg. 3-B-21), Checklist for Discharge (pg. 3-B-22), or Checklist for Retirement (pg. 3-B-23), as appropriate. This job aid is designed to be reproduced locally.

**Separation checklist** Action when separating a member.  
**Note:** First termers must still be screened by CFTRR even if they have no intention of reenlisting.

Step	Action	Reference	Date
1	<ul style="list-style-type: none"><li>• Complete predischarge interview 6 months prior to separation date.</li><li>• Transition Assistance Program counseling</li></ul> Forward the following to the PERSRU: <ul style="list-style-type: none"><li>• Preseparation Counseling Checklist (DD-2648).</li></ul> <b>Note:</b> Upon receipt of the DD-2648, the PERSRU will prepare and transmit a School Completion Transaction in SDA II using School Code 500650 <ul style="list-style-type: none"><li>• CG-3307 with SEP-4 entry completed.</li></ul>	12-B-4 PERSMAN, ALCOAST 049/00, ALCOAST 091/98	
		COMDTINST 1900.2 (series)	
		Encl. (1) PPPM	
		Encl. (6) PPPM	
2	Ensure member is physically qualified for separation.	12-B-6 PERSMAN	
3	Complete Assignment Data (CG-3698A) at least six months prior to date of separation indicating member's intention to separate. For all members eligible for reenlistment: <ul style="list-style-type: none"><li>• Indicate in "members comments" block of Assignment Data (CG-3698A), member's preferences in regards to a Selected Reserve Unit or Individual Ready Reserve (IRR). Also, include the member's address and phone number following separation.</li><li>• Mail original to CGPC (epm-2)</li><li>• Forward a copy to the ISC (fot) responsible for the geographic area which the member will reside after separation from active duty.</li><li>• Forward a copy to the member's PERSRU</li><li>• File a copy in Section 4 of the unit PDR</li></ul>	5-D-13 PPPM	

*Continued on next page*



**Section B**  
**SEPARATIONS**

## Checklist for Separations, Continued

### Separation checklist (continued)

Step	Action	Reference	Date
3 C o n t I n u e d	Upon receipt of the CG-3698A, an ISC representative will contact the member to discuss assignment options and answer questions about participation in the reserve.  If agreement is reached on an assignment to a billet in the selected reserve, the ISC will provide the member's servicing PERSRU with the information needed to effect the assignment. The CG-3698A with assignment information will be used to complete reserve assignment orders to the new unit.		
4	Complete follow-up interview at 3 months prior to separation date.	12-B-4 PERSMAN	
5	Complete PCS Departing/Separation Worksheet, PCS Entitlements Worksheet, and Career Intentions Worksheet, and forward to PERSRU with DD-2648 at least 60 days prior to the separation date.	PPPM Encl (1) CG HRSIC-2000 CG HRSIC-2003 CG HRSIC-2045	
6	PERSRU forward DD-214 SW (worksheet).	DD-214 Instruction	
7	PERSRU sends E-mail to HRSIC-SES (or <a href="mailto:SES/HRSIC@maillant.uscg.mil">SES/HRSIC@maillant.uscg.mil</a> if sending from SWSII) requesting DAFIS standard document ID and accounting data for separation travel order.	Exhibit 3-B-3 PPPM	
8	If the member is being discharged, and desires immediate enlistment in the Coast Guard Reserve the PERSRU will complete and forward an Enlistment Contract (DD-4/1), effective the day following discharge, to the unit for administration of the oath and signature.		

*Continued on next page*

**Section B**  
**SEPARATIONS**

## Checklist for Separations, Continued

### Separation checklist (continued)

Step	Action	Reference	Date
9	Ensure member schedules appointment with servicing transportation office to arrange shipment of household goods.	1-H-1 CGTRANSMAN	
10	Assist member in completing DD Form 803 (for member with FHA Mortgage).	16-I-8 PERSMAN	
11	Conduct Final Termination Briefing IAW Personnel Security Manual.	COMDTINST M5520.12A	
12	Counsel member on separation, • Complete CG-3307 entries, see Pg-7 Instruction (Encl. (6) of this manual) for sample entries.	12-B-53 PERSMAN	
13	Ensure Government Travel Charge Card is turned into coordinator for cancellation.	Charge Card Instruction	
14	Complete CG-3307 (SEP-19) entry for all enlisted members receiving Separation Pay and send a copy by fax to HRSIC (SES) at 785-295-2544.	COMDTINST 1000.14 (series)	
15	PERSRU completes PMIS/JUMPS transactions.		
16	Complete appropriate separation letter(s) from enclosure (4) to this manual.	Pg. 3-B-5, 7 PPPM	
17	Counsel member on separation travel • Provide member with travel claim form(s) and instructions for completion.	CGS-JFTR	
18	Provide member with pre-addressed envelope to mail travel claims and original separation travel order to HRSIC (TVL).	Appendix (E) PPPM	
19	Review PERSRU/MED PDR's and complete CG-5507.	12-B-49 PERSMAN	
20	Distribute PDR's.	PDR Instruction	

**Section B**  
**SEPARATIONS**

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## Checklist for RELAD

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**Introduction**      This checklist provides a job aid to be used when a member is released from active duty (RELAD) and should be used along with the Checklist for Separations. It is designed to be reproduced locally.

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**Checklist for RELAD**      Additional items when releasing a member from active duty.

Step	Action	Reference	Date
1	Complete Continued Health Care Coverage Benefit Program application.	CGCBP Instruction	
2	Complete ID Card(s).	Appendix (B) PPPM	
3	Counsel member on: <ul style="list-style-type: none"><li>• Assignment to Selected Reserve</li><li>• Complete Pay Delivery Worksheet (Encl. (1) PPPM) and forward to PERSRU if assigned to a drilling status after separation.</li></ul>		
4	Complete a CG-3307 if member is not processed for separation under normal circumstances and does not wish to be retained. Notify HRSIC of Date of Service (Separation Date) and that member signed CG-3307 for waiver.	Pg-7 Instruction Encl. (6) PPPM	
5	Ensure CG Mutual Assistance debts, which are desired to be collected from member's available pay during separation processing, are reported to the PERSRU.	9-A-5 PPPM	
6	Deliver separation paperwork to member		

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**Section B**  
**SEPARATIONS**

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## Checklist for Discharge

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**Introduction**      This checklist provides a job aid to be used when a member is discharged, and should be used along with the Checklist for Separations. It is designed to be reproduced locally.

---

**Checklist for discharge**      Additional items when discharging a member.

Step	Action	Reference	Date
1	Notify HRSIC (SES) (for Immediate or Priority discharges)	PPPM	
2	Complete a CG-3307 if member is not processed for separation under normal circumstances and does not wish to be retained. Notify HRSIC of Date of Service (Separation Date) and that member signed CG-3307 for waiver.	Pg-7 Instruction Encl. (6) PPPM	
3	Ensure CG Mutual Assistance debts, which are desired to be collected from member's available pay during separation processing, are reported to the PERSRU.	9-A-5 PPPM	
4	Complete Continued Health Care Coverage Benefit Program application.		
5	Complete appropriate Discharge Certificate.	12-B-51 PERSMAN	
6	Issue Honorable Discharge Button (if applicable).	12-B-52 PERSMAN	
7	Refer to exhibit in PERSMAN for special information concerning discharges.	12-B-1 PERSMAN	
8	If member will be enlisting in the Coast Guard Reserve immediately following discharge, complete an enlistment contract and return to servicing PERSRU		
9	Deliver separation paperwork to member.		

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**Section B**  
**SEPARATIONS**

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## Checklist for Retirement

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**Introduction**      This checklist provides a job aid to be used when a member retires, and should be used along with the Checklist for Separations. It is designed to be reproduced locally.

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**Checklist for retirement**      Additional items when retiring a member.

Step	Action	Date
1	Endorse retirement order • Forward one copy to the PERSRU.	
2	Ensure member receives retirement package from HRSIC (RAS) 6 months prior to retirement.	
3	If the member is married, ensure the member is aware that a married member is required to be enrolled in the Survivor Benefit Plan with spouse coverage at the maximum level (coverage will be based on the member's full gross retired pay) at the time of retirement, unless the spouse has concurred in writing to another election requested by the member.  • Prepare a letter as shown in enclosure (4) page E-4-2, of this manual, advising the member of these requirements.	
4	Ensure the member completes and returns the form(s) from Appendix (A), "Your Guide to Retirement," HRSICINST M1800.5 (series), (Copy of latest LES, CG HRSIC-4700, and if starting new allotments, CG HRSIC-7221).  <b>Note:</b> CG HRSIC-4700, CG HRSIC-4700R and CG HRSIC-7221 are available for online completion or downloading on HRSIC's website at <a href="http://www.uscg.mil/hq/hrsic">www.uscg.mil/hq/hrsic</a> . Select the "Forms" button.  • Administratively review the form(s), ensuring they are completed in accordance with the instructions in "Your Guide to Retirement," HRSICINST M1800.5 (series).	

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*Continued on next page*

**Section B**  
**SEPARATIONS**

## Checklist for Retirement, Continued

### Checklist for retirement (cont'd)

Step	Action	Date															
5	<p>If the member is married,</p> <ul style="list-style-type: none"> <li>Use this table to determine what actions are necessary to comply with the spousal notification/concurrence requirements of the Survivor Benefit Plan (SBP) when a married member elects not to participate or to participate at less than the maximum level in SBP.</li> </ul>																
<table border="1"> <thead> <tr> <th>If the member and spouse</th><th>And</th><th>Then</th></tr> </thead> <tbody> <tr> <td>are co-located in the area of the member's duty station and are living together as husband and wife</td><td>the spouse concurs with the member's SBP election</td><td>the spouse and witness will complete and sign part VII of the CG HRSIC-4700</td></tr> <tr> <td></td><td>the spouse does not concur with the member's SBP election</td><td>the command will send a letter of notification/concurrence to the spouse as shown in enclosure (4) page E-4-3 of this manual</td></tr> <tr> <td>are not co-located or are not living together as husband and wife</td><td></td><td>the command will send a letter of notification/concurrence to the spouse as shown in enclosure (4) page E-4-3 of this manual</td></tr> <tr> <td>are not living together as husband and wife</td><td>and the spouse's whereabouts are unknown and cannot be determined</td><td> <p>the member will complete and sign the following statement</p> <p>"The whereabouts of my spouse are unknown to me and have been unknown to me for at least 90 days. I understand that if this statement is later found to be untrue that spouse coverage will be established on the full amount of retired pay with costs and interest collected retroactive to my date of retirement unless my spouse consents otherwise. I understand that any false statement or misrepresentation thereto is a violation of law punishable by fine of not more than \$10,000 or imprisonment of not more than 5 years or both (18 U.S.C. 10001)".</p> </td></tr> </tbody> </table>			If the member and spouse	And	Then	are co-located in the area of the member's duty station and are living together as husband and wife	the spouse concurs with the member's SBP election	the spouse and witness will complete and sign part VII of the CG HRSIC-4700		the spouse does not concur with the member's SBP election	the command will send a letter of notification/concurrence to the spouse as shown in enclosure (4) page E-4-3 of this manual	are not co-located or are not living together as husband and wife		the command will send a letter of notification/concurrence to the spouse as shown in enclosure (4) page E-4-3 of this manual	are not living together as husband and wife	and the spouse's whereabouts are unknown and cannot be determined	<p>the member will complete and sign the following statement</p> <p>"The whereabouts of my spouse are unknown to me and have been unknown to me for at least 90 days. I understand that if this statement is later found to be untrue that spouse coverage will be established on the full amount of retired pay with costs and interest collected retroactive to my date of retirement unless my spouse consents otherwise. I understand that any false statement or misrepresentation thereto is a violation of law punishable by fine of not more than \$10,000 or imprisonment of not more than 5 years or both (18 U.S.C. 10001)".</p>
If the member and spouse	And	Then															
are co-located in the area of the member's duty station and are living together as husband and wife	the spouse concurs with the member's SBP election	the spouse and witness will complete and sign part VII of the CG HRSIC-4700															
	the spouse does not concur with the member's SBP election	the command will send a letter of notification/concurrence to the spouse as shown in enclosure (4) page E-4-3 of this manual															
are not co-located or are not living together as husband and wife		the command will send a letter of notification/concurrence to the spouse as shown in enclosure (4) page E-4-3 of this manual															
are not living together as husband and wife	and the spouse's whereabouts are unknown and cannot be determined	<p>the member will complete and sign the following statement</p> <p>"The whereabouts of my spouse are unknown to me and have been unknown to me for at least 90 days. I understand that if this statement is later found to be untrue that spouse coverage will be established on the full amount of retired pay with costs and interest collected retroactive to my date of retirement unless my spouse consents otherwise. I understand that any false statement or misrepresentation thereto is a violation of law punishable by fine of not more than \$10,000 or imprisonment of not more than 5 years or both (18 U.S.C. 10001)".</p>															

*Continued on next page*

**Section B**  
**SEPARATIONS**

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## Checklist for Retirement, Continued

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**Checklist for  
retirement (cont'd)**

<b>Step</b>	<b>Action</b>	<b>Date</b>
6	Forward the following to HRSIC (RAS) at least 30 days prior to retirement or start of terminal leave <ul style="list-style-type: none"><li>• CG HRSIC-4700 (four pages)</li><li>• Copy of latest LES, if member is continuing any allotments or direct deposit to same account</li><li>• CG HRSIC-7221 if member is starting any new allotments</li><li>• SBP Spousal notification/concurrence letter, endorsed by spouse, if a married member elects not to participate in SBP or to participate at less than the maximum level and the spouse does not complete part VII of the CG HRSIC-4700</li><li>• Statement signed by member, attesting that the whereabouts of spouse are unknown, if a married member elects not to participate in SBP or to participate at less than the maximum level and the spouse cannot be located.</li></ul>	
7	Ensure retirement certificate and spouse's certificates are received from HRSIC (RAS) at least 30 days prior to member's retirement or departure on terminal leave. Contact HRSIC (RAS) at (785) 357-3415 to request earlier delivery if necessary.	
8	Complete retired and dependent ID cards.	

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## Reserve Retirement Separations

### Introduction

Reserve retirements are processed by HRSIC (RAS). The three retirement categories are:

- **Retirement with Pay (RET-1)** for reservists who complete 20 years of satisfactory service and have reached age 60.
- **Retirement Awaiting Pay at Age 60 (RET-2)** for reservists who have satisfied all requirements for RET-1, except reaching age 60.
- **Retirement without Entitlement to Pay (RET-3)** for reservists who satisfy the requirements for retirement without pay entitlement, may be placed in this status at their request to avoid discharge or being placed in the Standby Reserve (Inactive Status).

### Procedures

#### Procedures for Retirement With Pay (RET-1)

When	Who does it	What happens
Six months prior to reaching age 60 and completing 20 years of satisfactory service	HRSIC (RAS)	Notify member in writing by sending an “Information Concerning Retirement With Pay (RET-1)” letter and information about the Reserve Component Survivor Benefit Plan. If election was previously deferred upon receipt of the “20 Year Letter”, the member must make an election at this time.
After receipt of “Notification of Eligibility Letter” and retirement forms.	Member	Request transfer to <b>RET-1</b> status by completing forms CG-HRISC-2055A and CG-HRSIC 4700R from Enclosure (1) and Appendix (A) to this manual. Requests must be for a future date and not sooner than three months from submission date to provide sufficient processing time.
<b>Note:</b> If the member is in a drilling status the retirement package will be sent to the member’s home address one month prior to age sixty; if the member is not in a drilling status the retirement package will be sent approximately six months prior to the sixtieth birthday.		
<b>Note:</b> If it is determined that member is not eligible for RET-1 status, a transfer to RET-3 status will be effected (age waivers to attain eligibility may be requested from and granted by CGPC (rpm)).		
1 month prior to retirement	HRSIC (RAS)	Forward to member: <ul style="list-style-type: none"><li>• Retirement Letter</li><li>• Final Point Statement</li><li>• Certificates of Appreciation</li></ul>
Retirement day	HRSIC (RAS)	Transmit Endorsement on Orders transaction
<b>Note:</b> Normally, reservists are voluntarily transferred to RET-2 status upon their request. There is one instance, however, where a reservist may be involuntarily transferred to RET-2 status. If an enlisted reservist has over 20 years satisfactory service, the reservist’s enlistment expires, and the reservist fails to reenlist, the reservist may be involuntarily transferred to RET-2 status per Article 1.G.9.G, Coast Guard Personnel Manual. In such cases, the reservist’s PERSRU shall notify ISC (pf) that the reservist has failed to reenlist. ISC (pf) shall in turn notify HRSIC (RAS). HRSIC (RAS) shall transmit Endorsement on Orders transactions to transfer the reservist to RET-2 status.		

*Continued on next page*



**Section B**  
**SEPARATIONS**

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## Reserve Retirement Separations, Continued

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**Procedures  
For RET-2  
Status**

Procedures for Retirement Awaiting Pay at Age 60 (**RET-2**) followed by Retirement With Pay (**RET-1**) upon reaching age 60.

**Note:** These steps apply only to those members who choose RET-2 status rather than continuing to drill.

<b>When</b>	<b>Who does it</b>	<b>What happens</b>
After completing 20 years of satisfactory service	HRSIC (RAS)	Sends “20 Year Letter” notifying member of eligibility for RET-2 Retirement. Include Reserve Component Survivor Benefit Plan election forms. (RCSBP is optional at this time)
After receipt of “20 year letter”.	Member	May request transfer to RET-2 status by completing form CG-HRISC-2055A from Enclosure (1) to this manual. Written requests are submitted to ISC (pf) via the chain of command. Requests must be for a future date and not sooner than three months from submission date to provide sufficient processing time.
Upon receipt of request for RET-2 Retirement	ISC (pf)	Forwards to HRSIC (RAS).
Upon receipt of request for RET-2 Retirement	HRSIC (RAS)	Forwards to member Retirement Information Package. <b>Note:</b> Members requesting RET-2 status who are not yet age 60 will receive retirement certificates at this time rather than at age 60 when transferred to RET-1 status.
RET-2 Retirement day	HRSIC (RAS)	Transmits Endorsement on Orders transactions to RET-2 status.

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*Continued on next page*

**Section B**  
**SEPARATIONS**

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## **Reserve Retirement Separations, Continued**

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**Procedures  
For RET-3  
Status**

Procedures for Retirement without Entitlement to Pay (RET-3)

<b>When</b>	<b>Who does it</b>	<b>What happens</b>
It has been determined that the member cannot reach 20 years satisfactory service prior to reaching age 60	HRSIC (RAS)	Prepare and send notification of retirement without pay.
<b>Note:</b> Members in receipt of the above notification may request an age waiver from CGPC (rpm).		
Prior to retirement	HRSIC (RAS)	Send final point statement, retirement certificate of service, and appreciation to member.
Day of Retirement	HRSIC (RAS)	Transmit Endorsement on Orders transaction.

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## Section Overview

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<b>Introduction</b>	This section will guide you through the procedures for reenlisting, extending, or retaining a member.
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<b>Continuous Pay</b>	Members reenlisting or extending/re-extending an enlistment are not separated from PMIS/JUMPS on the date of reenlistment or extension/re-extension. PMIS/JUMPS recognizes this service as continuous and, if all documents are input timely, pay continues uninterrupted.
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**In this section**

Topic	See Page
Reenlistment and Voluntary Extensions/Re-extensions	3-C-2
Checklist for Reenlistment or Extension	3-C-3
Retention of Members in a Pay Status Other than Military Confinement	3-C-5
Retention of Members in a Non-Pay Status or in Military Confinement	3-C-6
Active Duty Extensions of Reservists and Recall of Retirees	3-C-7
Immediate Enlistment in the Coast Guard Reserve Upon Discharge from the regular Coast Guard	3-C-9
Immediate Reenlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard	3-C-10

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## Reenlistments and Voluntary Extensions/Reextensions

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**Introduction**      This section will guide you through the process of continuing a member on active duty.

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**Process**      This is the process for Reenlistments and voluntary Extensions or Reextensions.

When	Who does it	What happens
At least 45 days prior to effective date of reenlistment/extension/re-extension	PERSRU	Prepares and transmits a Statement of Intent (SOI) transaction to PMIS/JUMPS.
<b>Notes:</b> (1) If an Acceptance of Agreement to Voluntarily (Re) Extend Enlistment transaction has processed in PMIS/JUMPS then a Statement of Intent transaction is required to be submitted 45 days in advance only if the member is entitled to an SRB. (2) Failure to submit this document in a timely manner may result in full stoppage of all pay, allowances and allotments.		
Effective date of reenlistment/extension/reextension	PERSRU	Transmits a Reenlistment Document (DD Form 4/1) or a Begin Service Under Voluntary (Re)Extension of enlistment transaction.
If applicable	HRSIC (MAS)	Calculates the full amount of Selective Reenlistment Bonus (SRB) and the amount of the initial SRB installment. Inputs any necessary transactions to record the SRB.
<b>Note:</b> The documents input by HRSIC (MAS) for credit of the SRB will not process in PMIS/JUMPS until the reenlistment/extension/reextension document input by the PERSRU successfully processes.		

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## Checklist for Reenlistment or Extension

**Introduction** This checklist provides a job aid to be used when a unit/PERSRU is completing necessary tasks for reenlistments or extensions and should be used along with the Checklist for Separations in section B of this Chapter. It is designed to be reproduced locally.

Step	Action	Reference	Date
1	Ensure member meets eligibility requirements.	1-G PERSMAN	
2	Advise member: <ul style="list-style-type: none"> <li>• May <b>reenlist</b> up to 3 months prior to normal expiration of enlistment (however, member can reenlist prior to 3 months if he/she meets the requirements for a SRB (refer to SRB Instruction) or is reenlisting for convenience of the government (refer to Chapter 1-G of the PERSMAN).</li> <li>• Reserve members may <b>reenlist</b> up to 90 days prior to normal expiration of enlistment.</li> <li>• Prorated loss of reenlistment bonus for the period of early reenlistment/extension.</li> <li>• The saved leave balance and regular leave balance on the effective date of separation.</li> <li>• The number of days leave previously sold during career.</li> <li>• Centralized First Term Reenlistment Review (CFTRR) application process.</li> </ul>	1-G PERSMAN	
3	Counsel member on SRB program.	SRB Instruction	
4	Ensure CG-3307 entry is completed for citizens of the Republic of the Philippines (see Pg-7 Instruction for sample entry).	12-B-47 PERSMAN	
5	Ensure member completes Career Intentions Worksheet and forward to PERSRU.	PPPM	
6	PERSRU forwards appropriate documentation to unit for member's signature.	PPPM	
7	Unit returns signed documentation to PERSRU for input into PMIS/JUMPS.	PPPM	
8	If member intended to discharge and decides to reenlist/extend, ensure member submits new Allotment Worksheet (if allotments stop).	PPPM	
9	Explain Article 137, UCMJ and Code of Conduct, Complete Page 7 (CG-3307) entry. <b>Note: PMIS Code will replace Page 7 requirement in upcoming change.</b>	8-A-1 PERSMAN, ALCOAST 049/00	

*Continued on next page*

## Checklist for Reenlistment or Extension, Continued

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### SRB processing

Process table for Selective Reenlistment Bonuses.

WHEN	THEN
retention documents submitted by the PERSRU have successfully processed in PMIS/JUMPS,	initial 50% SRB installment will be made within two pay periods.
lump sum payment is approved by CGPC (epm)	lump sum SRB payments will be processed by HRSIC within 30 days after receipt and included in the member's first regular payment following successful processing of the reenlistment/extension transaction.

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### Rules for payment of lump sum leave upon reenlistment or first extension of enlistment

These are the basic rules (per Art. 7-A-20, PERSMAN) for selling leave upon reenlistment or entering the first extension an enlistment.

- Members reenlisting within 90 days of their normal expiration of enlistment date, or extending their current enlistments for the first time, may receive payment for lump sum leave, not to exceed a career total of 60 days leave.
- Members reenlisting more than 90 days prior to their normal expiration enlistment date or reextending their current enlistments **MAY NOT** receive payment for lump sum leave.

Payment for lump sum leave will be included in the first end month payment following successful processing of the reenlistment/or begin service under first extension transaction.

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### Procedures for members with more than 90 days remaining on first enlistment

Members approved for retention under CFTRR, who desire to sell leave, but are not within 90 days of their normal expiration of enlistment, should enter into an agreement to extend their enlistment to meet the obligated service requirement.

- These members will be eligible to sell leave when their first extension of enlistment becomes effective.
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## Retention of Member in a Pay Status Other than Military Confinement

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<b>Introduction</b>	This includes members retained for reasons of Home Awaiting Orders Status (HOAS), cutter at sea, national emergency, failure to pass separation physical, etc., when stoppage of pay, allowances, and allotments should not occur.
<b>Reference</b>	To determine the length of retention beyond normal expiration of enlistment, review Article 12-B-11, CG Personnel Manual, COMDTINST M1000.6 (series).
<b>Procedures</b>	Procedures required by the PERSRU for retention of members in a pay status other than Military confinement.

<b>When</b>	<b>Action</b>
Prior to retention	Review reference to determine length of time the enlistment is to be extended.
At least 45 days prior to effective date of retention	Prepare and transmit a Statement of Intent transaction to PMIS/JUMPS.
<b>Notes:</b> (1) In cases of short notice (between 10 and 44 days prior to the retention date) the PERSRU is required to submit a Statement of Intent (SOI) transaction.  (2) In cases less than 10 days prior to retention effective date, the PERSRU shall notify HRSIC (SES) in lieu of preparing and transmitting an SOI.	
Effective date of retention	Prepare and transmit a Retained Beyond Normal Expiration of Enlistment transaction

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## Retention of Members in a Non-Pay Status or in Military Confinement

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**Introduction**      This includes member involuntarily retained because of military confinement, appellate leave, or any other non-pay status.

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**Reference**      To determine the length of retention beyond normal expiration of enlistment, review Article 12-B-11, CG Personnel Manual, COMDTINST M1000.6 (series).

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**Procedures**      Procedures required by the PERSRU for retention of members in a non-pay status or in Military confinement.

When	Action
Prior to retention	Review reference to determine length of time the enlistment is to be extended.
<b>Note:</b> Do not prepare a Statement of Intent transaction	
Effective date of retention	Prepare and transmit a Retained Beyond Normal Expiration of Enlistment transaction.

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## Active Duty Extensions of Reservists and Recall of Retirees

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**Introduction** This includes: Reservists on active duty being paid by PMIS/JUMPS whose active duty period is extended; regular members retiring and immediately being recalled to active duty, and members currently in a recall from retirement status whose active duty is being extended.

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**Procedures** Follow these procedures for all cases of active duty extensions of Reservists and recall of retirees.

When	Who does it	What Happens
At least 45 days prior to effective date	PERSRU	Prepares and transmits a Statement of Intent transaction to PMIS/JUMPS.
In time to arrive at least 30 days prior to effective date	PERSRU	Mails copy of the Amend Expected Active Duty Termination Date, Report Additional Active Duty Authorized, or Retirement With Immediate Recall to Active Duty transaction, as appropriate, to HRSIC (SES). In cases where the member is taking more than two periods of leave prior to effective date of extension/recall, include a copy of the Statement of Intent.
<b>Notes:</b> (1) In cases of insufficient lead time, the PERSRU shall notify HRSIC (SES) and provide all relevant information that would have been provided on the Statement of Intent.  (2) If the member's active duty is being extended via an amendment to the member's original orders and an Amend Expected Active Duty Termination Date transaction is submitted 45 or more date prior to the member's expected active duty termination date, then an SOI is not required.		

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## Active Duty Extensions of Reservists and Recall of Retirees, Continued

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**New AD orders or recall from retirement** Follow these procedures if the member's active duty extension is under new orders, or if a member is being retired and immediately recalled to active duty.

When	Who does it	What Happens
At least 10 days prior to effective date	HRSIC (MAS)	Notifies the PERSRU of any required corrections to the Report Additional Active Duty Authorization or Retirement With Immediate Recall to Active Duty transaction.
Effective date	Unit	Delivers the Certificate of Release or Discharge from Active Duty (DD-214).
Effective date	PERSRU	Transmits a new Report Additional Active Duty Authorized or Retirement With Immediate Recall to Active Duty transaction.

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## Immediate Enlistment in the Coast Guard Reserve upon Discharge from the Regular Coast Guard

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**Introduction**      Members in the regular Coast Guard being discharged may immediately enlist in the Coast Guard Reserve if they meet eligibility requirements.

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**Reference**      • CG Personnel Manual, COMDTINST M1000.6 Section 1-G

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**Definition**      The term **immediate enlistment** means within 24 hours following separation from the regular Coast Guard.

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**Procedures**      The District Commander (at) of the district or the Commanding Officer of the ISC (fot), where the member will reside following separation from the regular Coast Guard must approve the member's Assignment Data (CG-3698A), before the member may enlist in the Coast Guard Reserve.

Detailed instructions for completing and processing the CG-3698A can be found on the reverse side of the form. The process is summarized on the Checklist for Separations in section 3-B of this manual.

- If approved for enlistment in the Coast Guard Reserve the member shall be processed for discharge from the regular Coast Guard and enlistment in the Coast Guard Reserve by the PERSRU servicing the member at the time of separation using the **Routine Separation Procedures** listed in Section 3-B of this manual.

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**Enlistment in Coast Guard Reserve after 24 hours**      Enlistment in the Coast Guard Reserve after 24 hours following discharge from the regular Coast Guard must be processed at a Coast Guard recruiting office.

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## Immediate Enlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard

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**Introduction** Coast Guard Reserve members serving on extended active duty of 12 months or more may be authorized to enlist in the regular Coast Guard if they meet eligibility requirements.

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**Reference** • CG Personnel Manual, COMDTINST M1000.6 Section 1-G

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**Procedures** The member shall be processed for discharge from the Coast Guard Reserve and for enlistment in the regular Coast Guard by the regular PERSRU handling the member's records, using the following procedures:

When	Who does it	What Happens
In time to allow approval prior to date of reenlistment	Member	Submits letter request for reenlistment to Commander (CGPC-EPM) via chain of command as prescribed in the reference.
At least 45 days prior to effective date	PERSRU	Prepares and transmits a Statement of Intent (SOI) transaction to PMIS/JUMPS.
Day of discharge	Unit	Delivers DD form 214 to member.
Day following discharge	PERSRU	Transmits a Discharge transaction (P203) and an Enlistment into the Coast Guard transaction to PMIS/JUMPS.
If applicable	HRSIC (MAS)	Calculates the full amount of Selective Reenlistment Bonus (SRB) and the amount of the initial SRB installment. Inputs any necessary transactions to record the Selective Reenlistment Bonus.

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**Reservist on extended active duty** Coast Guard Reserve members who desire to enlist in the regular Coast Guard, and who are **NOT** currently on extended active duty of 12 months or more, must be processed at a Coast Guard recruiting office.

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